Switchboard
User Guide

The Switchboard helps to view and manage calls and queues very efficiently. You can pair the Switchboard with your Desk Phone or Softphone Apps! A great tool for call control as well as for remote workers!

Switchboard is more advanced and efficient call management!

Log onto your Switchvox User Portal.

Once logged onto the website, click here to load the **Switchboard**:

Welcome, CCi Training 1 (981)
Switchboard ✓
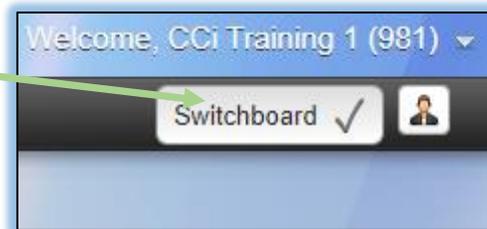
You will see a *Tool Bar* on top right of screen.

Your Account.
Go back to User portal /
Log out of Switchvox

CCi Training 1
981

Tour: Link that directs you to Sangoma **Switchvox Switchboard** Training Videos.

Layouts: Create/Edit personal Widget Layouts on Home Screen.
(See Switchboard Layouts)

Status: Update your Status. You can also add personal messages to your status for a more detailed explanation.

Settings: Choose the type of notifications you would like to get. Edit which device you would like to make call through Switchboard.

Notifications: See notifications that have occurred in the past.

Switchboard *Device Setup / Dialing*

The Switchboard can pair up with any device associated with an extension. Once the device it paired, you can then use the Switchboard dial pad to make calls with that device!

Click ⚙ to access **Settings**.

Additional Phones

Make Calls With

Main Extension ▲
Main Extension
Mobile Softphone
Desktop Softphone

Use the Dial Pad (on top of screen) to make calls from that device.

Under "Additional Phones", choose the device you want paired with **Switchboard**

⚏ Enter a number | **DIAL**
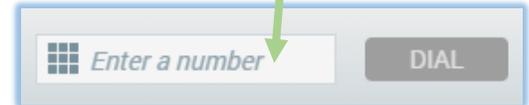
Switchboard *Layouts:*

Unless your local Admin has created a default Switchboard layout, your main Switchboard screen will be blank. You will need to populate the screen with the widgets that you find useful for your operations.

To add widgets to your page, click on the "**Layouts**" icon. 🖥

A tab will open where you can edit, delete, copy the current layout, or create a new one. Since this is a blank layout, we can choose "edit".

Default Layout

Edit

New

Copy

Delete
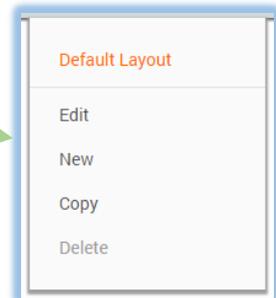
You will see a "**Layout Editor**" toolbar on the top of page.

🖥 Layout Editor | Add Widget ▼ | Layout Name: | Default Layout ▼ | **SAVE** | DELETE | EXIT

Select "**Add Widget**".

You will get a list of available widgets you can add to your main page. Once added to screen, you can then:

Move widget around page

✛ ⚙ ✖

Remove Widget from page.

Edit settings of widget.
(see Widgets. Next section)

Switchboard *Widgets:*

My Calls

When adding the **My Calls** widget, you can choose what features you would like on the widget. You can also have the Voicemail and Call Log as separate widgets.

My Calls
- ✅ Calls ✅ Switch to Calls tab on new calls
- ☐ Call Logs
- ☐ Voicemail

CANCEL   SAVE
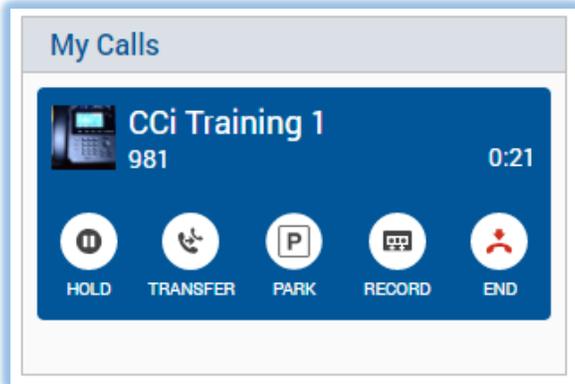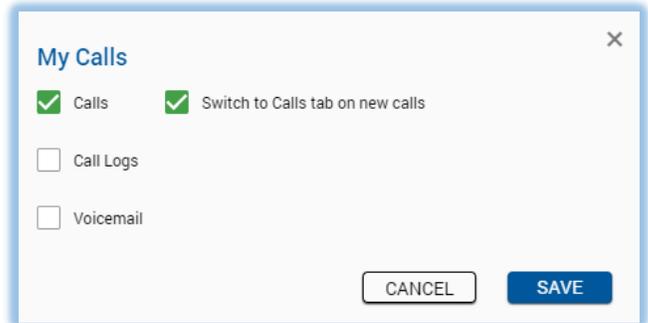
View the *call* that you are on.
(Using desk phone, **Sangoma Talk**, or **Sangoma Phone** for desktop).

My Calls

CCi Training 1
981   0:21

HOLD   TRANSFER   PARK   RECORD   END

Manage multiple calls more efficiently.

Full call control:

Hold – Transfer – Park – Record – End Call

HOLD - Click to place caller on hold. Click **RESUME** to retrieve caller from Hold.

TRANSFER - Click to start the Transfer process. Click **CANCEL** to cancel Transfer.

PARK - Click to park the call in an extension. Use the **Park Calls** widget to retrieve caller!

RECORD **(If allowed by your local Admin)** - Click to start recording the call. Click **END RECORD** or **END** to stop the recording.

* Recordings are saved in your Voicemail Recordings folder. Can be accessed by desk phone or user portal. *

END - Click to end call

Parked Calls

When adding the **Parked Calls** widget, you can easily retrieve any call that is parked by your business

Parked Calls

791   CCi Training 1
      981   0:02
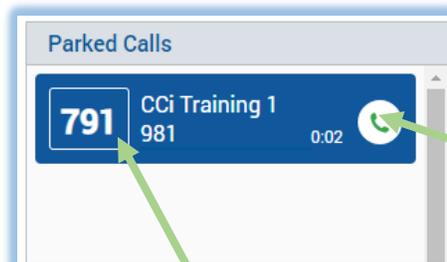
Click to answer
Parked Call

Parking Lot Ext # caller is in.
(You can also dial this number to retrieve call)

Call Activity

See, in real time, coworkers' statuses. Who is on a call and for how long. Open up their "Call Card" to get their information and perform phone operations (Dial,Transfer,etc)

Call Activity

Title

Training Studio

Extensions/Groups to Display

CCi

Available

GROUPS

CCI Staff Contact list

INTERNAL DIRECTORY

981 CCi Training 1
982 CCi Training 2
983 CCi Training 3
984 CCi Training 4
986 CCi Training 5
989 CCi Training 6

Selected

GROUPS

CCi Voice Training Phones
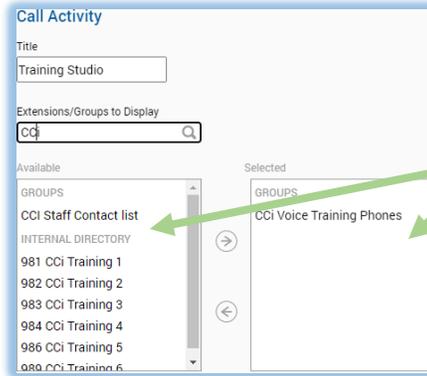
Add from your Contacts who you would like on your Call Activity Widget (Click from contact window on left and add to widget window on right)

See coworker's **status** in real time

Training Studio

MEMBER	CALLER	DURATION
CCi Training 1	981	-	-
CCi Training 2	982	-	-
CCi Training 3	983	0:15
CCi Training 4	984	-	-
CCi Training 5	986	1:07
CCi Training 6	989	-	-

See who is on the phone at that moment and how long they are on call.

Clicking on the Contact's name will bring up their **Call Card**.
- See their Contact info
- See if they are busy on phone
- See their Status
- Dial their ext. - Dial their VM - Intercom

CCi Training 3

Training@CCiVoice.com

Training Phone
NY Office

Idle — Available

Extension: 983

Dial — Transfer — Dial VM — Intercom

Queues

If you are member of a Call Queue (Hunt Group) you can easily monitor your queue calls. You can also set alerts to notify you if a caller has been waiting a certain amount of time!

My Queues: See your activity in queue you are part of. (Taken/Missed Calls, "Wrap-Up" time.)

QUEUE	WRAP-UP	LOGIN	TAKEN	MISSED
All Queues				
Test Queue			5	1

My Queues

Queue Overview

Queue Calls Waiting

Queue Member Activity

Wallboard

If you are a "**Log In**' member of a queue, you can **Log Out** or **Pause** your queue calls.

Pause — Reason

Log Out
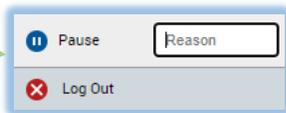
Queue Overview: See the activity of the members in the queue you are part of. See other members Login Status as well.

	WAITING		MEMBERS		PAST CALLS			
QUEUE	CALLS	TIME	IN	BUSY	TAKEN	MISSED	ABD	AVG
Test Queue [A]	0	-	2	0	8	10	6	0:16
CCi Training 1			✅		6	10		
CCi Training 2			❌		0	0		
CCi Training 3			✅		2	0		
CCi Training 4			❌		0	0		

Queue Calls Waiting: See all callers on line that have not been answered yet.

	CALLER	PHONE	WAIT
1	CCi Training 2	982	0:23

As a user, you have the ability to get notified on your computer if a caller has been waiting in the queue for a defined amount of time.

Waiting time threshold (seconds)

In the **Queue Calls Waiting** widget's settings, you can enter the amount of time the caller waits until you get a notification.

☐ Raise notification when threshold is passed

CANCEL   SAVE

Click to receive an audible alert on your computer

Click to save settings

Queue Member Activity: Similar to the **Call Activity** widget. This will show members of your Call Queue only.

Queue Member Activity - Test Queue   ✛ ⚙ ✖

	MEMBER NAME	LOGIN	CALLER	DURATION
1	CCi Training 1	981 ✅	-	-

Wallboard: Great for CSRs and Call center users. Has clearly defined information board about status of queue(s).

Calls Waiting		members		Past Calls			
WAITING	MAX WAIT TIME	LOGGED IN	BUSY	TAKEN	MISSED	ABANDONED	AVERAGE WAIT TIME
0	-	2 /4	0	8	10	6	0:16

You also have the ability to set a "Waiting Time Threshold". Similar to **Queue Calls Waiting** widget, you can get a notification from the Wallboard that a caller has been waiting a certain amount of time

Quick Dial: *Contacts / Rapid Dials*

Add / edit a list of contacts **(custom or same layout as your desk phone's Rapid Dials)** for expedited options during/making a call.

- See coworkers' status
- Dial contact
- Transfer to contact **(during a call)**
- Dial coworker's voicemail

Training Phones

MEMBERS

CCi Training 2 982	⛔	📞	📞	👥
CCi Training 3 983	🧑	📞	📞	👥
CCi Training 4 984	🕐	📞	📞	👥
CCi Training 5 986	🧑	📞	📞	👥
CCi Training 6 989	🧑	📞	📞	👥

Conference Room

Once you have created your own **MeetMe Conference Room** Number (via User Portal) you can now monitor and control your own Conferences directly through the **Switchboard**!

When you want to start a conference, press "Join" next to your **Conference Room** Number you created in your User Portal.

Conference Room

34045 | JOIN | Duration: 00:00:00 Users: 0 | MUTE OTHERS | END CONF

The device you have paired with your **Switchboard** will then start the conference call.

- Mute All
- End Whole Conference

All callers in your current **Conference Room**

Conference Room

34045 | Duration: 0:45 Users: 4 | MUTE OTHERS | END CONF

MEMBERS	TIME	CONTROLS
CCi Training 1 981	0:42	🎤 🚫
CCi Training 2 982	0:17	🎤 🚫
CCi Training 3 983	0:33	🎤 🚫
CCi Training 4 984	0:24	🎤 🚫

Mute/Kick Individual callers

Switchboard *Call Control:*

Once you have created your own Switchvox **Switchboard** Layout and saved it, you can now utilize all the **Call Control** advantages it has. Handle ALL phone operations such as:3

Incoming Calls – Warm/Cold Transfers - Parked Calls – Voicemails - Status

Incoming Calls

When you are receiving an incoming call on your device (Desk Phone, Mobile App, Desktop App) the **My Calls** Widget displays the caller's ID and some options.

You will still need to answer the call with either the Desk Phone's handset, headset, speaker, or the Mobile/Desktop Apps. (Depending on what you have paired with **Switchboard**)

If you choose not to answer call, **Switchboard** allows you to:

Send caller directly to your Voicemail.

Transfer call to another extension.

Ignore Call
(Stops ringing at your desk, keeps ringing for caller until they go to voicemail)

Transfers

Perform **Cold** *"Blind"*, **Warm** *"Assisted"* Transfers, and Transfer to Voicemail with the Switchboard!

While on a call, click to start the Transfer process.
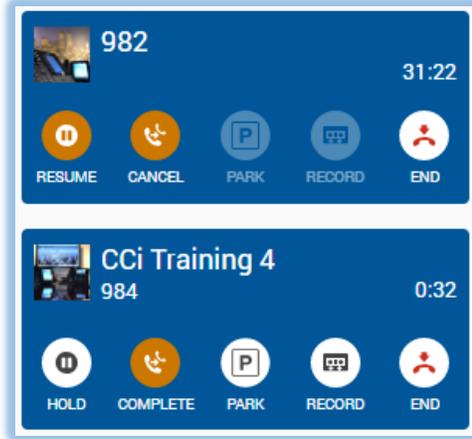
Cold *(Blind)* Transfers:

After clicking the **Transfer** button, choose a Contact from your **Contacts Window** (on right side of Switchboard), **Quick Dials** Widget, or click on the Contacts name in their **Call Activity** Widget!

After you choose who you would like to "**Cold**" transfer to, click the icon to send the caller to that contact's extension.

Quick Dial Widget

Contact's Name
Call Activity Widget
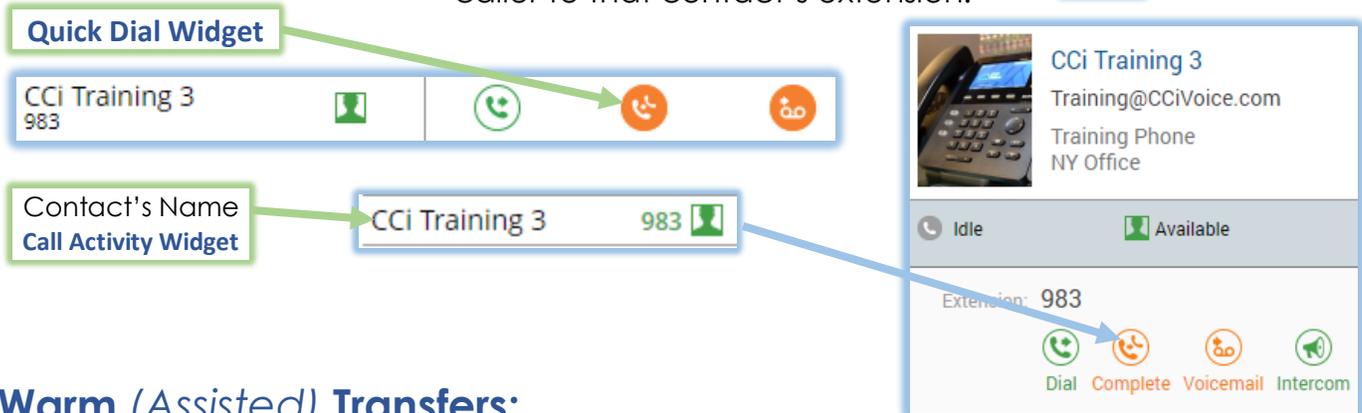
Warm *(Assisted)* Transfers:

After clicking the **Transfer** button, choose a Contact from your **Contacts Window** (on right side of Switchboard), **Quick Dials** Widget, the Contacts number in their **Call Activity** Widget, or dial their number directly from the **Dial Pad**!

After you choose the contact you would like to "**Warm**" transfer to, click the icon to call that contact. This places the caller on hold. Once you reach that contact/coworker answers, you then click the icon to complete the transfer

Quick Dial Widget

Contact's Number
Call Activity Widget

Switchboard Dial Pad

My Calls Widget
(To Complete Transfer)
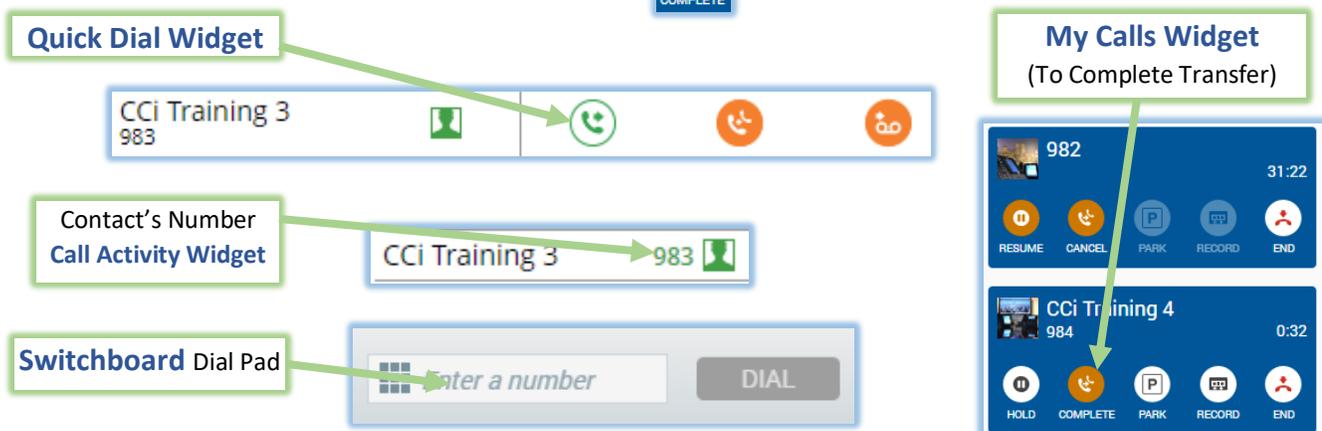
Transfer to Voicemail:

After clicking the **Transfer** button, choose a Contact from your **Contacts Window** (on right side of Switchboard), **Quick Dials** Widget, the Contact's name in their **Call Activity** Widget

Quick Dial Widget

CCi Training 3
983

CCi Training 3
Training@CCiVoice.com
Training Phone
NY Office

Idle — Available

Extension: **983**

Dial   Complete   Voicemail   Intercom

Contact's Name
Call Activity Widget

CCi Training 3   983

Call Log & Voicemail

Keep track of your *Dialed, Received,* and *Missed Calls* with the **Call Log.**
Stay on top of your **Voicemails** in a quick and efficient way!

My Calls

☐ Calls   ☐ Switch to Calls tab on new calls

☐ Call Logs

☐ Voicemail

CANCEL   SAVE

When adding the **My Calls** widget, you can also have the **Voicemail** and **Call Log** as separate widgets.

Add both or one individually and click **save** to make it's own separate widget.

Voicemail Widget:
Visual voicemail. See contact's information, play, delete, forward message to coworkers. Call contact back, etc.

Click to open VM Options

Voicemail
● CCi Training 3   00:15
983   11/18/22 at 3:23 PM

Voicemail
● CCi Training 3   00:15
983   11/18/22 at 3:23 PM

▶ 00:00 ●————— 00:15

CALL BACK   READ   FORWARD   DELETE

Plays **VM** on computer audio.

VM Options.

Choose Extension to forward voicemail to.

Forward to...
Search

CCi Training 1   981
CCi Training 2   982
CCi Training 3   983
CCi Training 4   984
CCi Training 5   986
CCi Training 6   989

Call Log Widget:
See log of your dialed, received, and missed calls.

Call Logs

✕ CCi Training 2   -
982   11/17/22, 03:04 PM
✕ CCi Training 2   -
982   11/17/22, 03:04 PM
📞 CCi Training 3   29:47
983   11/17/22, 12:52 PM
📞 CCi Training 2   0:05
982   11/17/22, 12:52 PM
📞 CCi Training 4   0:46
984   11/17/22, 12:49 PM
📞 CCi Training 2   0:04

Click on contact's number to call them.